



HUD USER MANUAL

Public and Indian Housing (PIH)

Real Estate Assessment Center (REAC)

Inventory Management System (IMS)

Housing Inventory Module

Housing Agency sub Module

*U.S. Department of Housing and Urban Development
(HUD)*

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1.0 HOUSING INVENTORY



1.0 Housing Inventory

1.0 HOUSING INVENTORY

The **Housing Inventory** sub module allows the user to view PHA data, inventory of units that the PHA has at its disposal, and allows the user to propose buildings or units for removal. The **Housing Inventory** module includes three sub modules: **Housing Agency** sub module, **Development** sub module and the **Inventory Removals** sub module.

The **Housing Agency** sub module provides various types of data for PHAs. PHAs can use this sub module to enter, update and maintain their information. This sub module also allows the users to create new PHAs.

The **Development** sub module includes information about the inventory of units and buildings that PHAs manage. This sub module allows the users to view the current unit and building inventory, add new inventory items and delete inventory items that are no longer needed. The inventory information is provided at the development level, building level and unit level. Users can group any inventory items in the database based on various For example, units can be grouped by unit tenant status, submission status type, or unit designation.

The **Inventory Removals** sub module allows PHAs to remove certain items from their inventory by proposing those items for demolition / disposition. This sub module allows PHAs to fill the demo/dispo application, submit it with accompanying documentation, review the application and approve it. After the demo/dispo application is approved, inventory items that are subject to that application no longer are part of the PHA's inventory.



1.0 Housing Inventory

1.1 HOUSING AGENCY

The **Housing Agency** sub module is a primary resource for HA location, staff, and inventory data. It allows the user to view and print information for different Housing Agencies (see Figure 1).

HA Code	HA Name	Temp Office	Program Type	FYL	Low Rent Units	Section 8 Units	Activity Status
AR002	North Little Rock Housing Authority		Combined	06/30	1085	0	Y
AR003	Fort Smith Housing Authority		Combined	09/30	280	0	Y
AR004	Little Rock Housing Authority		Combined	12/31	1194	0	Y
AR005	Dlytheville Housing Authority		Combined	09/30	341	0	Y

Figure 1: Housing Authority tab

Accessible via the **Housing Inventory** module in the Public and Indian Housing Information Center (PIC), this sub module contains the official listings for an HA's:

- Physical and Mailing Addresses
- Phone and Fax Numbers
- Assigned HUD Staff
- Contact Person Information (e.g. the **executive director's** email address)
- Occupancy Reports
- Historical Event Records
- Funding Data
- Performance Data

In addition, the **Housing Agency** sub module provides the functionality to Review, Approve, and Reject Occupancy Reports online (for HUD); and Generate customized reports on a variety of HA-related topics.

HA Sub module Data Sources

In order to understand the information in the **Housing Agency** sub module, it is important to know the sources that supply data displayed in this sub module. The following provides the data sources for the main categories of information presented in the sub module. Refer to the topic-specific sections of this manual for more extensive data source information.



1.0 Housing Inventory

HA Staff Supplied Data

The HA staff members are responsible for supplying and updating the following information as necessary:

- HA Addresses
- HA Phone and Fax Numbers
- Contact Information for People with HA Roles
- Occupancy Report Submissions

HUD Staff Supplied Data

The Hub and Program Center (PC) staff members are responsible for supplying the following information:

- HUD Staff Assignments
- Temporary Office Designations (when needed)
- Occupancy Report Approvals or Rejections

Funding Data

The **Housing Agency** sub module draws funding data from the HUD Central Accounting and Program System (HUDCAPS) and the Line of Credit Control System (LOCCS).

Inventory Data

The **Housing Agency** sub module draws the inventory data from PIC's **Development** sub module. The Section 8 Housing inventory data comes from HUDCAPS.

Performance Data

The Real Estate Assessment Center provides the HA performance data for the sub module. SEMAP supplies the Section 8 performance data.

Other HA Information Resources

Other HA resources in the HUD web space draw data from the **Housing Agency** sub module.

1.1.1 Housing Authority Tab

Privacy Act statement and Compliance Notice

Before the user proceeds to the **Housing Authority** tab, the user must to agree to the Privacy Act Statement and Compliance Notice. In order to do so, the user must read the legal agreement and click the **Agree** button (see Figure 2: Privacy Act Statement and Compliance Notice).

The Privacy Act protects sensitive data. Thus, if the user does not agree to comply with the Privacy Act Statement and Compliance Notice, the program would not display the data subject to the Privacy Act. If the user does not want to agree to comply with the Privacy Act and Compliance notice, the user can click **Decline**. In this case, the user can still access the pages in the sub module that requires the user to comply with the Privacy Act Statement; however, the program would not allow the user to access the data subject to Privacy Act.



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Figure 2: Privacy Act Statement and Compliance Notice

1.1.1.1 List sub Tab

When the user clicks the **Housing Agency** module, the program displays the tabs available within this sub module. The **Housing Authority** tab is displayed by default. The **Housing Authority** tab allows the user to select the Public Housing Agency (PHA) using the controls on the **List** sub tab (see Figure 1).

To select a PHA, the user must select the **Field Office HA** in the **Select View** list. The **TARC HA** option allows the user to view a list of TARC HAs. TARC HAs are “troubled” PHAs that have problems and need assistance or corrections performed on their processes and that are assigned to the Troubled Agency Recovery Center. Then, the user must select the appropriate Hub and Field Office in the respective lists. The user must leave the default selection (**PO Field Operations**) in the **HQ Division** list. After the user selects the appropriate Filed Office, the program displays the list of PHAs associated with the current Filed Office.

The user can also use the search options and look for PHAs that match certain search criteria. The search options in the **Housing Authority Search Filters** section allow the user to narrow the list of PHAs that the program displays (Figure 3).

The **Program Type** search list allows the user to view PHAs that participate in a certain program type. The available program types are **Combined**, **Low-Rent** and **Section 8**. If the user selects the **All** option, then the program will include all PHAs in the search results regardless of the program type.

The **Activity Status** list allows the user to select PHAs that are active or inactive in the system. The available options are **Active**, **Inactive** and **All**. If the user selects the **Active** option, then the program will include the PHAs with the activity status set to **Active**. If the user selects the **Inactive** option, then the program will include the PHAs with the activity status set to **Inactive**. If the user selects the **All** option, then the program will display the PHAs of both activity statuses.

The **LR Size** list allows the user to select only PHAs that have a certain number of tenants.



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To apply the search criteria, the user must click **Retrieve**. When the user clicks **Retrieve**, the program lists the PHAs that matched the search criteria set by the user in form of a grid. The grid indicates the total number of records (PHAs) that matched the search criteria and the number of records displayed on the current page. The grid features the following columns:

The **HA Code** column displays the PHA code that consists of two letters and three digits. The two letters indicate the state where that PHA is located. And the digits indicate individual number of the PHA. The HA codes are displayed as links. If the user clicks on any HA code, the program will display the data pertaining to the PHA selected and divided by sub tabs.

The **HA Name** column displays the name of the Housing Authority.

The **Temp Office** column displays the temporary office that the PHA is assigned to for correction and improvement, if applicable.

The **Program Type** column displays the type of the subsidized housing program in which that PHA participates.

The **FYE** column displays the fiscal year end date for every PHA. The fiscal year end date displays the last day and month of the PHA's fiscal year. A PHA can have only one of the four FYEs: 03/31, 06/30, 09/30, 12/31.

The **Low Rent Units** column displays the number of public housing units for every PHA that have the **Initial Approval Completed** submission status type associated with them. The program derives this data from the **Development** sub module. The **Section 8 Units** column displays the number of units subject to the Section 8 program. The program derives this data from the **Development** sub module.

The **Activity Status** column indicates whether the PHA is active or inactive in the system.

The user can sort the PHA list based on the columns. If the user clicks the column heading, the program will list the PHA list based on the data provided in this column in an ascending or descending order. The red asterisk (*) indicates troubled PHAs that have been assigned to TARC for correction.

Records 1 to 147 of 147

HA Code ▲	HA Name ▲	Temp Office ▲	Program Type ▲	FYE ▲	Low Rent Units ▲	Section 8 Units ▲	Activity Status ▼
AR001	North Little Rock Housing Authority		Combined	06/30	1085	0	Y
AR003	Fort Smith Housing Authority		Combined	09/30	280	0	Y
AR004	Little Rock Housing Authority		Combined	12/31	1194	0	Y
AR005	Dwightville Housing Authority		Combined	09/30	341	0	Y

Figure 3: List sub tab of the Housing Authority tab



1.0 Housing Inventory

The **Create Housing Authority** link allows the user to access the **Create Housing Authority** page (see Figure 4). This page allows the user to create a new PHA that will be associated with the current Hub and Field Office. To create a new PHA, the user needs to enter the new PHA data in the provided boxes. To be able to save the information, the user must at least enter the required minimum of data into the mandatory controls. The mandatory controls are marked by an asterisk (*).

The minimal required data includes the **HA Code**, which is the postal abbreviation of the state the HA is in and a three-digit number. The **Common Name** is the name that the PHA is commonly known by. The **Formal Name** is the name that the PHA uses for all legal documentation. The **HA Program Type** is the type of assisted housing program that the PHA participates in (public housing or Section 8).

The **HA Participant Type** list allows the user to select the type of HA created. The **Public Housing Authority** is typically a non-governmental organization. The **State Housing Authority** is governed by the state government. The **Disaster Agency Only** type is a special type of PHA created in the disaster affected areas for funding purposes.

The user also must enter the PHA's phone number. Other data is not mandatory to be able to save the new PHA record. After the user enters all the required data, the user must click **Save** to save the data. If the user clicks **Cancel**, the program will prompt the user to confirm cancelling the creation of new PHA. If the user clicks **OK**, then the program will return to the PHA listing on the **List** sub tab.

Figure 4: Create new Housing Authority page

1.1.1.2 Details sub Tab

The HA Code for each HA in the list is a link. The user can click it to view the **Details** page for the selected HA. If the number of HAs in the list exceeds one page (generally more than 100 entries), the program displays a **Next** link to allow the user to view the remaining records. After clicking the **Next** link, the user can also click the **Previous** link to return to the previous page. After selecting the HA from the table, the user can view its information on all other sub module pages without having to identify it



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again. The **Details** sub tab displays the two main groups of data – the summary Housing Agency details and inventory.

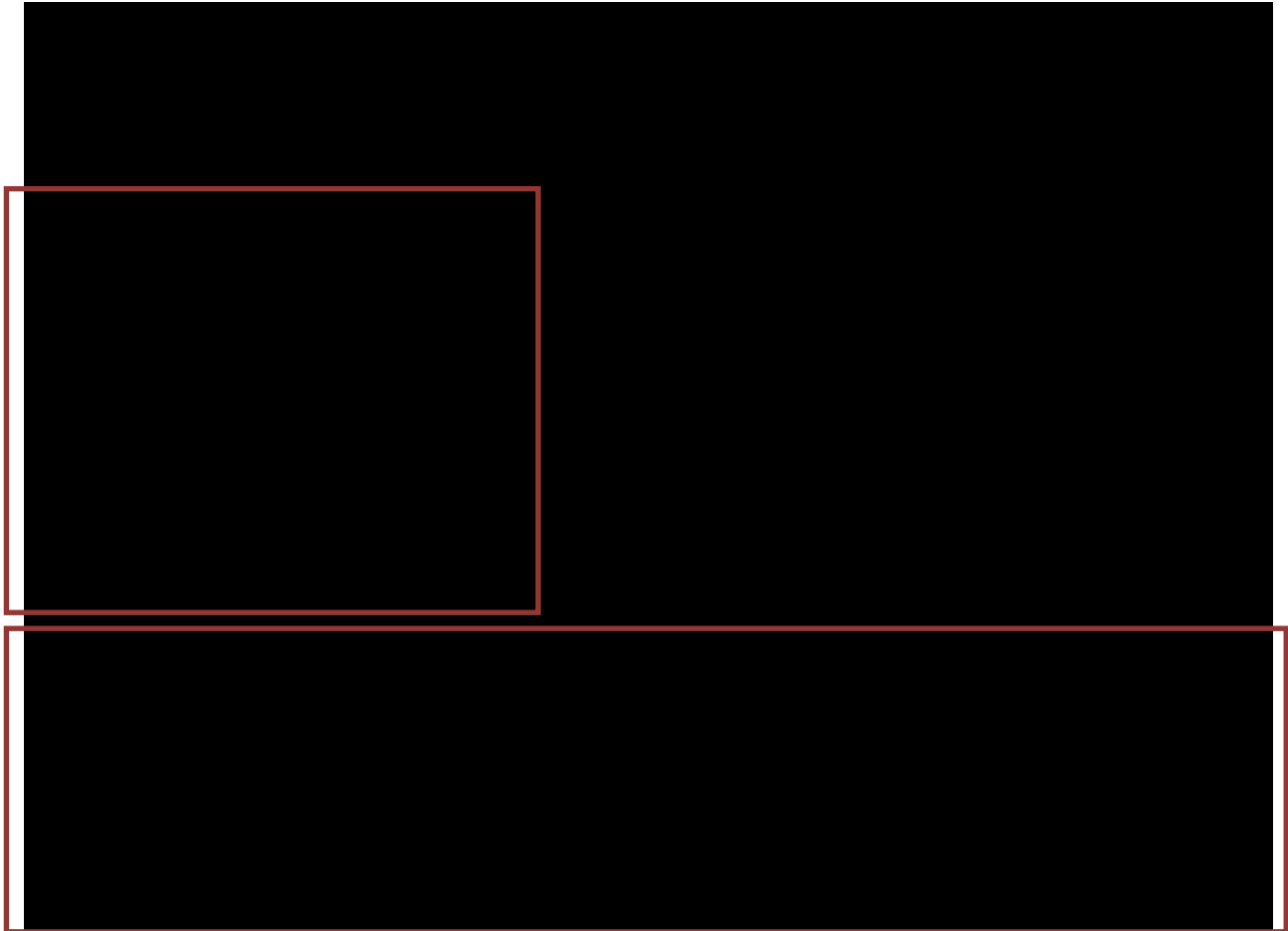


Figure 5: Details sub tab of the Housing Authority tab

The **Housing Authority Details** section of the **Details** sub tab displays the summarized PHA data. It also allows the user to modify PHA data (see Figure 5) using the options in the **Modification Type** list. The user can modify the PHA details (name and contact information) (see Figure 6).



1.0 Housing Inventory

Field	Value
HA Code	10001
Common Name	PHI 35
Formal Name	Lower Public Housing Authority
Activity Status	Active
HA Program Type	Low Rent
HA FY End	05/30
Phone Number	202 - 002 - 4091
Fax Number	202 - 832 - 4678
City Number	202 002 2017
Web Page Address	www.hudhousings.gov
Email Address	ph35@hudhousings.gov

Figure 6: Modify PHA Details page

After the user performs any changes, the user must click **Save** to save the changes or **Cancel** to exit the page without saving.

HA Codes

HA Codes for the Low Rent, Public Section 8, and Combined program types follow a simple format. This format consists of a post office abbreviation for the state or territory the HA is located in, and a three digit number. The number should continue the numerical ascent of the previous HA Code in the state or territory. There are no spaces or other characters separating these two components. Use a zero for a placeholder where needed. For example, the most recent HA Code assigned to a Delaware HA program is DE005. If the state creates another HA for one of those program types, the new HA Code would be DE006. The number should directly follow the most recent (highest) HA Code issued. PIC will not allow the user to create a new record if the HA Code has been used before. Even codes for defunct HAs cannot be used.

The **Housing Authority Unit Summary Information** section displays the summarized inventory information for the PHA derived from the **Development** sub module (see Figure 5). The summarized inventory information is displayed in form of a grid that provides the number of dwelling units, non-dwelling units and the total number of units that are part of the current PHA's inventory. The unit data for dwelling units is further broken down by unit designation i.e. elderly units and family units. The unit data for non dwelling units is further broken down into merged units and other types of non-dwelling units.

PIC distinguishes between 8 types of non-dwelling units: Administrative Uses, Merged Unit, MTW Neighborhood Services, Resident Amenities, Special Use – Anti Drug / Crime, Special Use – Other Resident Activities, Special Use – Self Sufficiency Activities, Unauthorized. For summarization purposes, the **Housing Authority Unit Summary Information** section displays only the combined count of non-dwelling units included in the current PHA's inventory. Further, the unit counts are broken down by unit designation and bedroom count.



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1.1.1.3 Address sub Tab

The **Address** sub tab of the **Housing Authority** tab contains the current PHA's addresses (see Figure 7). PHAs can have two types of addresses, physical and mailing. A physical address represents the HA's location (for example, in an emergency, the rescue squad would arrive at the HA's physical address). If different from the physical address, a mailing address represents an alternate location where the HA's mail is delivered. For example, it can be a PO Box address. A mailing address is only required if an HA's correspondence is not sent to its physical address. The user can select the type of the address to view in the **Select Address Type** list. HA PIC users are responsible for keeping this page up-to-date.

The screenshot shows the 'Address' sub tab of the 'Housing Authority' tab. The form is divided into several sections:

- Address Type Selection:** A dropdown menu labeled 'Select Address Type' is set to 'Physical'. A 'Modify Address' link is visible in the top right corner.
- Address List:** A table listing addresses with columns for 'Address Line 1', 'Address Line 2', 'City/Location', 'Country Name', 'State', and 'Zip Code'. The first entry is 'Public and Indian Housing' with 'PO Field Operations' as the address line 2.
- Additional Address Information:** A section containing various codes and identifiers, including 'Rural Route Code', 'County Code', 'Congressional District Code', 'SAB Code', 'County FIPS Code', 'County MSA Code', 'FIPS Code', 'State FIPS Code', 'County FIPS Code', 'City FIPS Code', 'Zip Code', 'Highway Contract Route Code', 'State Name Code', 'Locality Code', 'SAB Code', 'FIPS Code', 'County MSA Code', 'City FIPS Code', and 'Zip Code'.

Figure 7: The Address sub tab of the Housing Authority tab

The user can also modify both types of PHA addresses. To modify an address, the user must select the desired option in the **Address Type** list and click the **Modify Address** link.

When the user clicks the **Modify Address** link, the program displays the PHA's address boxes (Figure 8). At this point, the user can enter a different address, or correct clerical errors. The user must fill the required boxes that are marked by an asterisk (*) before saving the changes. To save the changes, the user must click **Save**. If the user clicks **Cancel**, then the program will not retain the changes performed by the user.



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Comments Reports Home to New User

Housing Authority HUD Staff HA Contacts Temporary Office HA History

List Details Address Inventory Performance Funding

HQ Office: Public and Indian Housing
HQ Division: PO Field Operations
Hub: SHHON Honolulu Hub
Field Office: SCPH HONOLULU HUB Office
Housing Authority: HHSO1 HPHA

Address Information

Address Type: Physical

Address Line 1: P.O. Box 17507

Address Line 2:

County Name: Honolulu

City/Locality: Honolulu

State: Hawaii

Zip Code: 96817

* Designates a required field.

Cancel Save

Figure 8: Modify Address page

1.1.1.4 Inventory sub Tab

The **Inventory** sub tab of the **Housing Authority** tab provides a summary of development and unit data for the selected HA (see Figure 9). PIC draws the data for the Low rent program type from the **Development** sub module and the Section 8 data from HUDCAPS.

Comments Reports Home to New User

Housing Authority HUD Staff HA Contacts Temporary Office HA History

List Details Address Inventory Performance Funding

HQ Office: Public and Indian Housing
HQ Division: PO Field Operations
Hub: SHHON Honolulu Hub
Field Office: SCPH HONOLULU HUB Office
Housing Authority: HHSO1 HPHA

Inventory Detail

Low Rent Information

Status	Development	Units
In Management	18	5,373
In Development	0	0
Total	18	5,373

Figure 9: The Inventory sub tab of the Housing Authority tab

1.1.1.5 Performance sub Tab

The **Performance** sub tab of the **Housing Authority** tab provides a summary of the selected HA's most recent Public Housing Assessment System (PHAS) Score (see Figure 10).



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The screenshot shows the 'Performance' sub tab of the 'Housing Authority' tab. At the top, there are navigation tabs: 'Community', 'Reports', 'TO DO', 'New Inventory', 'Inventory History', and 'NA History'. Below these are sub-tabs: 'List', 'Details', 'Address', 'Inventory', 'Performance', and 'Funding'. The 'Performance' sub-tab is active, displaying a 'Performance List' section. Below this, there is a table with the following data:

Assessment Date	Assessment Type	Assessment Score	Designation	MOA Event or IP Event	Temp Office
07/26/2008	PHAS	75	Standard Performance	None Critical	94PH

Figure 10: The Performance sub tab of the Housing Authority tab

The **Performance List** section features a grid that displays all the assessment instances. Each record includes the date and type of the assessment, the score of the assessment, and the designation assigned to the PHA based on the score. The **MOA Event or IP Event** and **Temp Office** columns are no longer applicable.

The **Assessment** score is derived from the **Risk Assessment** sub module. It determines the **Designation** assigned to a PHA, and whether the PHA needs to perform any corrective actions to improve their score.

1.1.1.6 Funding sub Tab

The **Funding** sub tab of the **Housing Authority** tab displays a PHA's grant data (see Figure 11). The **Housing Agency** sub module draws funding data from the HUD Central Accounting and Program System (HUDCAPS) and the Line of Credit Control System (LOCCS).



Figure 11: The Funding sub tab of the Housing Authority tab



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The user can set the program to display the funding data based on the search criteria in the **Housing Authority Funding** section of the page. The **Funding Program Type** list allows the user to view the funding data only applicable to the Low Rent or Section 8 program types. If the user selects the **All** option, then the program will display the funding data applicable to both program types.

The **Grant Program Type** list allows the user to view funding data applicable only to the grant program type selected. The **Grants** list allows the user to select a specific type of grant received by the PHA. The **FY Returns** list allows the user to select the time frame for the funding data to be displayed.

1.1.2 HUD Staff Tab

The HUD Staff tab allows the user to view and edit the list of HUD staff members assigned to a PHA and their roles that these staff members perform for the PHA. The **List** sub tab of the **HUD Staff** tab displays the list of Field Office staff members assigned to a PHA and the roles that these staff members perform for the PHA they are assigned to (see Figure 12).

The screenshot shows the HUD Staff List sub tab with various search filters and a table of staff members. The filters include: Select View (Field Office), HQ Office (Public and Indian Housing), HQ Division (DO Field Operations), Hub (BPH T Baltimore Hub), Field Office (BPH RAI TIVORE HUB OFFICE), and Housing Authority (MLUOT Annapolis Housing Authority). The table displays 5 records of staff members with columns for Staff, Role, Effective Start Date, and Office.

Staff	Role	Effective Start Date	Office
dlw, dlwnew	PIC Coach	04/01/2009	BPH
lurifing, nardoc	Supervision/Management	01/01/2009	BDPI
miguewen, nate	Community Relations & Involvement	01/01/2010	BPH
ovanz, ovazi	Public Housing Revital. Spclt	01/01/2009	BDPI
stok, maly	Facilities Management	04/01/2009	BPH

Figure 12: The List sub tab of the HUD Staff tab

The **List** sub tab of the **HUD Staff** tab features a grid that provides the following information: the name of the Field Office staff member assigned to the PHA selected, the role that this staff member performs for the PHA, the start date when the current assigned staff member started on the current role, and the code of the Field Office that the current staff member works at.

The user can change the Field Office staff members assigned to the current PHA by clicking the **Assign / Unassign Staff** link. When the user clicks the **Assign / Unassign Staff** link, the program displays the **Assignment** tab (see Figure 13).

The **Assignment** tab allows the Security Coordinator for the Field Office to assign Field Office staff members to the PHA, unassign currently assigned staff members, or change the currently assigned staff members' roles. To assign a staff member to the current PHA, the user must select the desired HQ Division, Hub, and Field Office. When the user selects the desired Field Office, the program displays all the staff members who have user profiles in IMS that are associated with the current Field Office in the **Available Staff** box. This data is drawn from the **Security Administration** sub module of the **PIC Maintenance** module. The user can select any staff member from the **Available Staff** box to associate with the current PHA by clicking the staff member's name.



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After selecting a staff member, the user must select a role that this staff member will perform for the PHA. The user can select the role from the **Available Roles** box. The available roles data is drawn from the **Reference** sub module of the **PIC Maintenance** module. The user can select any available role from the **Available Roles** box to associate with the selected staff member.

After the user selects the staff member and the role, the user must enter the effective date (when the staff member starts performing the role) in the **Effective Start Date** box. The date must follow the MM/DD/YYYY format. Then, the user can click the right arrow button and move the selected staff and staff role in the **Assigned Staff Roles** box. The program adds the staff member and the role in the **Assigned Staff Roles** box in the following format: Staff Member / Staff Role. To save the changes, the user must click **Save**.

The screenshot displays the 'Assignment' sub tab of the 'HUD Staff' tab. It features a 'List' section on the left with a table of staff members. The central area contains dropdown menus for 'Select Role' and 'Effective Start Date', along with 'Select' buttons. The right panel, titled 'Assigned Staff Roles', shows a list of roles assigned to the selected staff member. The 'Available Staff' list includes HQ Officer, HQ Director, Info, HQ Director, Housing Authority, and HUD Staff Assignment. The 'Available Roles' list includes Administration, Community Involvement & Involvement, Counsel, and Facilities Management. The 'Assigned Staff Roles' list includes the Housing / PIC Coach, Housing Services / Support Management, Involvement / Community Relations & Involvement, and Housing Services / Public Housing Federal Social Work / Facilities Management. The 'Effective Start Date' is set to 11/01/2011.

Figure 13: The Assignment sub tab of the HUD Staff tab

After the user saves the changes, the user will be able to see the new staff member and the role assigned to this staff member in the **List** sub tab of the **HUD Staff** tab.

1.1.3 HA Contacts Tab

The **HA Contacts** tab allows the user to view and create PHA staff members records. The **List** sub tab of the **HA Contacts** tab allows the user to select a desired PHA, select the PHA staff members' status and view all the staff members that matched the selection criteria (see Figure 14). The user can select the staff member status in the **Contact Status** list. The user can select the **Active** status and the program will display the current contact staff members. The user can select the **Inactive** status and the program displays the inactive PHA contacts. If the user selects the **All** option, then the program will display the PHA contacts of both statuses.



1.0 Housing Inventory

Contact	Role	Phone Number	Email
Bhaskar, Satish	Chief Financial Officer	(915) 819-3730	sbhaskar@hacp.org
Amador, Carlos	Executive Director	(915) 849-4702	carlos@hacp.org
Dion, Yolanda	Contact, IIA PIC Contact	(915) 819-3768	yldion@hacp.org
Kramer, Michael	Chief Operating Officer	(915) 849-4704	mikramer@hacp.org
Rivera, Lorena	Section 8 Director	(915) 819-3852	lrivera@hacp.org
Smalbeck, Michael	Attorney	(915) 849-4709	michael@hacp.org

Figure 14: The List sub tab of the HA Contacts tab

The **Housing Authority Contact List** section features a grid that lists the PHA contact staff list and provides the following information: the contact name, role, phone number and email address. If the user selects the **All** option, then the program will also display the **Status** column indicating whether the staff member is active or inactive.

The name of the staff member in the **Contact** column is a link. When the user clicks the name of a contact, the program displays the contact details in the **Details** sub tab of the **HA Contacts** tab (see Figure 15). The **Details** sub tab displays all available details associated with the current contact and allow the user to add or modify existing data.

First Name	Last Name	Title	Solution	Phone Number	Fax Number	TTY Number	Email Address
Satish	Bhaskar	CFO	Mr.	(915) 819-3730	(915) 819-3809	(915) 819-3809	sbhaskar@hacp.org

Figure 15: The Details sub tab of the Contacts tab



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To add or modify contact details the user must click the **Modify Contact Details** link (see Figure 15). The program displays all the user information in editable controls. At this point, the user can update, erase, or add contact details (see Figure 16). After the user modifies the details, the user must click **Save** to save the changes. If the user clicks **Cancel**, then the program will not retain the changes performed.

The screenshot shows the 'Housing Authority Contact Details' form. The form is divided into two main sections: 'Contact Information' and 'Role Information'. The 'Contact Information' section includes fields for First Name, Last Name, Title, Salutation, Phone Number, Fax Number, TTY Number, Email Address, and Confirm Email Address. The 'Role Information' section includes fields for Role, Effective Date, and Expiration End Date. A red box highlights the form fields, and another red box highlights the 'Cancel' and 'Save' buttons at the bottom right.

Figure 16: Modifying Contact Details

The **Address** sub tab of the **HA Contacts** tab displays the HA contact mailing and physical addresses (see Figure 17). This tab also allows a user to modify both addresses by clicking the **Modify Address** link. To modify an address, the user must select the type of address in the **Select Address Type** list, and then click the **Modify Address** link.

The screenshot shows the 'Housing Authority Address Information' form. The form is divided into two main sections: 'Address Information' and 'Role Information'. The 'Address Information' section includes fields for First Name, Last Name, Select Address Type, Address Line 1, Address Line 2, County Name, City/Locality, State, and Zip Code. The 'Role Information' section includes fields for Role, Effective Date, and Expiration End Date. A red box highlights the form fields, and another red box highlights the 'Modify Address' link at the bottom right.

Figure 17: Address sub tab



1.0 Housing Inventory

1.1.4 Temporary Office Tab

When a PHA is underperforming, this PHA has to be assigned to a different Field Office for improvement. This assignment can be viewed and created using the **Temporary Office** tab of the **Housing Agency** module (see Figure 18).

Users can see the temporary office assignments in the **Temporary Office Assignment List** section. This section features a grid that displays the name of the Field Office that the current PHA is assigned to, the date when the assignment started, the target end date (when the assignment is planned to end), actual end date (when the assignment actually ends), and the reason for the assignment.

Assigned to	Effective Date	Target End Date	Actual End Date	Reason
WASHINGTON STATE OFFICE	11/01/2001	11/01/2010		Workload/Staffing Issues

Figure 18: Temporary Office tab

This tab allows the user to both view and create new assignments. To assign a PHA to a different Field Office, the user must click the **Create Temporary Assignment** link (see Figure 18).

In the **Temporary Office Assignment** section, the user must select the Field Office to assign the current PHA. Normally, a PHA would be assigned to a Field Office within the same state or district, however, a PHA may be assigned to any Field Office in the country (see Figure 19). The user must select the Field Office in the **Assign To** list. Then, the user must select the date when the assignment starts in the **Effective Date** box. The user can enter the date when the assignment is planned to end in the **Target End Date** box. All the dates must be entered in the MM/DD/YYYY format. The user must also select the reason why a PHA had to be assigned to a different Field Office for improvement in the Reason for Temporary Office Assignment list. After entering all the necessary data, the user can click **Create** to create an assignment record. If the user clicks **Cancel**, then the program will return to the **List** sub tab of the **Temporary Office** tab without saving any data.

Assign To: Public and Indian Housing
Effective Date: 11/01/2001
Target End Date: 11/01/2010
Reason for Temporary Office Assignment: Workload/Staffing Issues

Create Cancel



1.0 Housing Inventory

Figure 19: Creating Temporary Assignment

1.1.5 HA History Tab

The **HA History** tab allows the user to view all the events that trigger data archival (see Figure 20). An event is considered to be any data change that requires a PHA data to be archived. For example, if a user changes the unit tenant status of any unit in the PHA, the program will archive the data before changes can take effect.

The **Housing Authority History** section features a grid that lists all the archival events and the search options that allow the user to view only certain archival events. The **Archive Date** column of the grid displays the day when the PHA data was archived. The **Archive Trigger** column of the grid displays the type of change that triggered the data archiving. The **Last Update User before Change** column displays the user name of the user who performed the data change that triggered the data archival.

Archive Date	Archive Trigger	Last Update User Before Change
05/21/2008	Building/Unit Information Approval	vmsw@h.vocare.com
06/18/2008	Transition to New Development Number	vmsw@h.vocare.com
07/12/2007	Building/Unit Information Approval	vmsw@h.vocare.com
06/19/2007	Building/Unit Information Approval	vmsw@h.vocare.com
06/18/2007	Building/Unit Information Approval	vmsw@h.vocare.com
07/10/2006	Building/Unit Information Approval	vmsw@h.vocare.com

Figure 20: HA History Tab

The user can set the program to display only records of certain archive trigger type, and within a certain date range. To filter the records, the user must select the desired data changing (archival trigger) event and enter the desired date range in the **Date to** boxes using the MM/DD/YYYY format. After entering all the necessary data, the user must click **Retrieve**.

The date of the record in the **Archive Date** column is a link. If the user clicks any date, the program will display detailed historical record information in the **Details** sub tab of the **HA History** tab (see Figure 21). The user can view or print the historical record details from this sub tab.



1.0 Housing Inventory

Comments		Reports		Trans. to New Dev Nos	
Housing Authority	HUD Staff	HA Contacts	Temporary Office	HA History	
List				Details	
HQ Office:	Public and Indian Housing				
HQ Division:	PO Field Operations				
Hub:	10HSEA Seattle Hub				
Field Office:	OAPH SEATTLE HUB OFFICE				
Housing Authority History Details					
Archive Record Trigger:	Transition to New Development Number				
Creation Date:	04/13/2008				
HA Code:	AK001				
Common Name:	AHFC				
Formal Name:	Alaska Housing Finance Corporation				
Organization Assignment:	ALASKA STATE OFFICE				
HA Program Type:	Low-Rent				
Activity Status:	Active				
HA FYE:	06/30				
Executive Director:	Daniel R. Fauske				
Low Rent Development Projects:	0				
Low Rent Development Units:	0				
Low Rent Management Projects:	16				
Low Rent Management Units:	1334				
Low Rent Total Projects:	16				
Low Rent Total Units:	1334				
Last Modified User:					

Figure 21: The Details sub tab of the HA History tab

1.1.6 Comments Tab

The **Comments** tab allows the user to add and view comments (see Figure 22). The comments can be made by PHA staff members or an Executive Director. Based on this distinction, comments can be of **General** or **Executive** type. The user can select the type of comment to view in the **Sort by Comment Type** list.

PHAs can leave any comments at their discretion. There's no restriction as to the kind of information that can be put in a comment.



1.0 Housing Inventory

The screenshot shows the 'Housing Inventory' system interface. At the top, there are tabs for 'Overview', 'Reports', 'HA Info', 'HA History', and 'HA Contacts'. Below these tabs, there is a 'List' button. The main content area displays the following information:

- HAQ Office: Public and Indian Housing
- HAQ Division: PHD Field Operations
- HAQ: SHMIA Miami Hub
- HAQ Office: ADPH MIAMI HUB OFFICE
- Housing Authority: FL 050 PUNTA GORDA

Below this information, there is a 'Comments' section. It contains the text: 'All information entered into this system is public and must be supported by facts and/or evidence.' and 'Comment Type: General'. The 'Enter Comment' text area is highlighted with a red box. The 'Cancel' and 'Save' buttons are also highlighted with a red box.

Figure 24: Adding a comment

1.1.7 Reports Tab

The **Reports** tab of the **Housing Agency** sub module allows the user to access four reports providing various types of information about a PHA (see Figure 25). The reports are presented as sub tabs that the user can access to run appropriate reports.

1.1.7.1 HA Report

The **HA Report** sub tab displays the two kinds of information: the HA address and cap fund data verification contact. The HA address information is drawn from the information that PHA staff members enter in the **Housing Authority** tab. The **Housing Authority Capital Fund Data Verification Contact** section displays the name of the person responsible for cap fund data verification.

The information presented on this page is read-only. Users cannot edit or delete any data from the **HA Report** sub tab.

1.0 Housing Inventory

Community		Reports		Tools & New Info	
Housing Authority	HUD Staff	HA Contacts	Temporary Offices	HA History	
HA Report			HA Summary		HA Contact List
Select View: Field Office (W) <input type="button" value="Select"/>					
HQ Office: Public and Indian Housing					
HQ Division: FO Field Operations <input type="button" value="Select"/>					
Hub: 4-PMA Miami Hub <input type="button" value="Select"/>					
Field Office: 4DPI MIAMI HUD OFFICE					
Housing Authority: FIC60 PUNTA GORDA <input type="button" value="Select"/>					
Housing Authority Address					
Address Type: Mailing					
Address Line 1: 340 Gulf Breeze Avenue					
Address Line 2:					
City: PUNTA GORDA					
County: CHARLOTTE					
State: FL Florida					
ZIP Code: 33950 -					
Housing Authority Contact Information					
Contact Name: JEFF CARINO *					
Title: Executive Director					
Solution: MS					
Phone Number: (941) 539 - 4144 ext 0					
Fax Number: (941) 539 - 1753					
E-Mail Address: jcarngah@comcast.net					
* Indicates that the contact(s) are inactive.					

Figure 25: Reports tab, HA Summary report

1.1.7.2 HA Summary Report

The **HA Summary** report displays unit data drawn from the **Development** sub module of the **Housing Inventory** module (see Figure 26). The user can see the total number of structures and units grouped by development, program type, structure type, etc. The data is read only, the user cannot edit or delete any information.

Home Reports Tools Help																							
Training Activities BUD Status IRM Contacts Personnel Office IRM History																							
<div> <div> IIA Report </div> <div> IIA Summary </div> <div> IIA Contact List </div> <div> IIA Profile </div> </div>																							
<div> <div> Select Item: </div> <div> Full Office IIA </div> </div>																							
<div> <div> IIQ Office: </div> <div> Public and External Monitoring </div> </div>																							
<div> <div> BQ Division: </div> <div> PO Full Operations </div> </div>																							
<div> <div> Bale: </div> <div> All IIA Model Data </div> </div>																							
<div> <div> Field Office: </div> <div> ICPH MWB HUD OFFICE </div> </div>																							
<div> <div> Browsing Authority: </div> <div> FLOPS PUNYA GORDIN </div> </div>																							
IIA Summary Report as of Wednesday, April 24, 2019																							
Development Info																							
<table border="1"> <thead> <tr> <th>Overlaid Structures</th> <th>Non-Overlaid Structures</th> <th>Standardized Sites</th> <th>Non-Standardized Sites</th> <th>Total Number of Developments</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>1</td> <td>0</td> <td>1</td> <td>1</td> </tr> </tbody> </table>	Overlaid Structures	Non-Overlaid Structures	Standardized Sites	Non-Standardized Sites	Total Number of Developments	0	1	0	1	1													
Overlaid Structures	Non-Overlaid Structures	Standardized Sites	Non-Standardized Sites	Total Number of Developments																			
0	1	0	1	1																			
Programs/Tools																							
<table border="1"> <thead> <tr> <th>Time-Sensitive Historical</th> <th>Time-Sensitive Data Market Work</th> <th>Windows 10 Model Development</th> <th>Business 2017 Standard</th> <th>Inventory ID</th> </tr> </thead> <tbody> <tr> <td>3</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Time-Sensitive Historical	Time-Sensitive Data Market Work	Windows 10 Model Development	Business 2017 Standard	Inventory ID	3	0	0	0	0													
Time-Sensitive Historical	Time-Sensitive Data Market Work	Windows 10 Model Development	Business 2017 Standard	Inventory ID																			
3	0	0	0	0																			
Development Method																							
<table border="1"> <thead> <tr> <th>Map-based and/or Data-based</th> <th>IRM-IP</th> <th>Non-Data-based</th> <th>Time-Sensitive Data</th> <th>Inventory</th> <th>Time-Sensitive Data</th> <th>Conventional</th> <th>Non-Data-based</th> <th>Conventional</th> <th>IRI-based Data</th> <th>Inventory</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>0</td> <td>1</td> <td>1</td> <td>2</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Map-based and/or Data-based	IRM-IP	Non-Data-based	Time-Sensitive Data	Inventory	Time-Sensitive Data	Conventional	Non-Data-based	Conventional	IRI-based Data	Inventory	0	0	1	1	2	0	0	0	0	0	0	
Map-based and/or Data-based	IRM-IP	Non-Data-based	Time-Sensitive Data	Inventory	Time-Sensitive Data	Conventional	Non-Data-based	Conventional	IRI-based Data	Inventory													
0	0	1	1	2	0	0	0	0	0	0													
Structure Type																							
<table border="1"> <thead> <tr> <th>Historical Structures</th> <th>Market Data</th> <th>Non-Data-based Data</th> <th>Standardized</th> <th>Single Property Data-based</th> <th>IRI-based Data-based</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>1</td> <td>1</td> <td>0</td> <td>0</td> <td>0</td> </tr> </tbody> </table>	Historical Structures	Market Data	Non-Data-based Data	Standardized	Single Property Data-based	IRI-based Data-based	0	1	1	0	0	0											
Historical Structures	Market Data	Non-Data-based Data	Standardized	Single Property Data-based	IRI-based Data-based																		
0	1	1	0	0	0																		
Current Data Distribution																							
<table border="1"> <tbody> <tr> <td>Handwritten Units</td> <td>0</td> </tr> <tr> <td>Electronic Units</td> <td>0</td> </tr> <tr> <td>Non-Electronic Units</td> <td>0</td> </tr> </tbody> </table>	Handwritten Units	0	Electronic Units	0	Non-Electronic Units	0																	
Handwritten Units	0																						
Electronic Units	0																						
Non-Electronic Units	0																						

Figure 26: Reports tab, HA Summary report



1.0 Housing Inventory

1.1.7.3 HA Contact List Report

The **HA Contact List** sub tab allows the user to run a report to view the PHA contacts (see Figure 27). To run the report, the user can use the report options to set the program to display only desired information. The user can select the desired contact role in the **Role** list. Then the program will include the PHA contacts that are associated with the selected role. The user can also search for a PHA contact by the first and/or last name of the contact. The **Contact Status** list allows the user to select the **Active** or **Inactive** contact status. If the user selects the **All** option, then the program would display contacts of both statuses and indicate the contact status in the **Status** column.

If the user clicks **By Field Office** button, then the program will display all the PHA contacts for all the PHAs associated with the Field Office selected. To run the report, the user must click the **Generate Report** button.

Figure 27: HA Contact List report sub tab

The HA Contacts report lists PHA contacts and provides the following information (see Figure 28):

- The **Housing Authority** column displays the name of the PHA that the contacts are associated with. The user can click the column name and sort the contacts by PHA in an ascending or descending order.
- The **Contact Name** column displays the first and last names of the contacts. The user can click the column name and sort the contacts alphabetically in an ascending or descending order.
- The **Status** column indicates whether a contact is still active or inactive in the system. The user can click the column name and sort the contacts in accordance with their status.
- The **Role** column displays the role of the contact in the PHA. The user can click the column name and sort the contacts by their roles in an ascending or descending order.
- The **Email**, **Mailing Address**, **Physical Address**, **Phone Number** and **Fax** columns display various contact information for the PHA contacts.



1.0 Housing Inventory



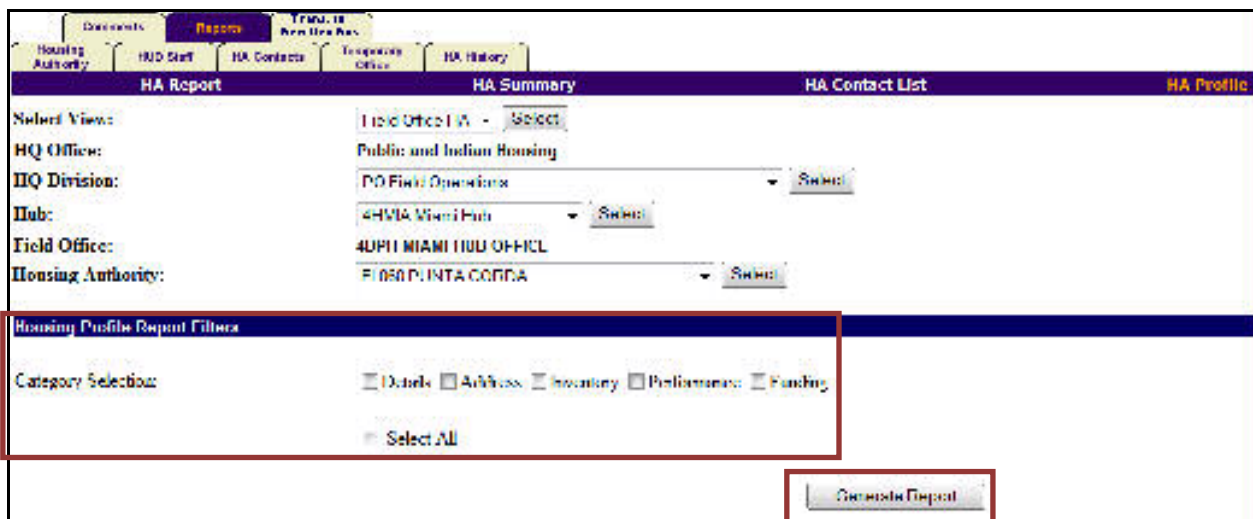
Housing Authority	Contact Name	Status	Role	Email	Mailing Address	Physical Address	Phone Number	Fax
New Orleans HA	John Johnson	Active	Executive Director	john.johnson@ha.org			(504) 670-2257 ext.	(504) 285 6769
New Orleans HA	John Johnson	Active	Executive Director	john.johnson@ha.org	4100 Tenth Street New Orleans, Louisiana 70122		(504) 670-2257 ext.	(504) 285 6769

Figure 28: HA Contacts report

If the report is more than one page long, the program will allow the user to navigate to the desired page by selecting the page number in the **Select Page Set** list. The user can also print the report by clicking **Print**, or download report data in the Excel program by clicking the **Download in Excel** button.

1.1.7.4 HA Profile Report

The HA Profile report allows the user to view and print all PHA information drawn from the **Housing Authority** tab (see Figure 29). The information categories are presented in the **Category Selection** area. The user can select details, address, inventory, performance, or funding to be included in the report by selecting the appropriate check box.



HA Report HA Summary HA Contact List HA Profile

Select View: Field Office HA - Select

HQ Office: Public and Indian Housing

HQ Division: PO Field Operations

Hub: 4HMA Miami Hub

Field Office: 4UPH MIAMI HUD OFFICE

Housing Authority: FIDSO PUNTA CONDA

Housing Profile Report Filters

Category Selection: ☐ Details ☐ Address ☐ Inventory ☐ Performance ☐ Funding

☐ Select All

Generate Report

Figure 29: HA Profile sub tab

To run the report, the user must click the **Generate Report** button.

1.1.8 Transferring to New development Numbers Tab

The **Trans. to New Dev Nos** tab allows the user to request to transfer a PHA to new development numbers and view the New Development Mapping report and Duplicate Building report (see Figure 30). Transferring to new development numbers for PHAs means development regrouping based on the way PHAs manage their developments. For example, if a PHA had three developments, but all of them were managed in the same way, the PHA could regroup them into one new development with a new development number that will include all buildings from all three previous developments.



1.0 Housing Inventory

	HA Code	HA Name
<input checked="" type="checkbox"/>	FL002	ST. PETERSBURG
<input checked="" type="checkbox"/>	FL003	TAMPA
<input checked="" type="checkbox"/>	FL005	MIAMI DADE
<input checked="" type="checkbox"/>	FL008	SARASOTA HOUSING AUTHORITY
<input checked="" type="checkbox"/>	FL009	WEST PALM BEACH HOUSING
<input checked="" type="checkbox"/>	FL010	FT. LAUDERDALE
<input checked="" type="checkbox"/>	FL011	LAKELAND
<input checked="" type="checkbox"/>	FL012	AVON PARK
<input checked="" type="checkbox"/>	FL013	KEY WEST
<input checked="" type="checkbox"/>	FL017	MIAMI BEACH

Figure 30: Transferring to New Development Numbers tab

1.1.8.1 New Development Mapping Report sub Tab

PHAs can see the transfer process results in the New Development Mapping report (see Figure 31). To run the report, the user must select the desired PHA in the **Housing Authority** list and click **Generate Report** button.


To select the PHA, the user must select the appropriate HQ Division, Hub, and Field Office.



Generate Report

Figure 31: New Development Mapping report sub tab

The New Development Mapping report maps old development numbers to new developments numbers. This way, if the user is looking for a development after transferring to the new development numbers, the user can see where the old development was transferred. The report also includes the building numbers, date the transfer was requested, date the transfer was completed, the transfer indicator (whether the development numbers were transferred to the new development numbers), and the status of transfer.

1.0 Housing Inventory



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New Development Mapping Report

HQ Office:

Public and Indian Housing

HQ Division:

PO Field Operations

Hub:

SHCLV Cleveland Hub

Field Office:

5CPH CINCINNATI COMMUNITY SERVICE CENTER

Housing Authority:

OH004 CINCINNATI MHA

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#	New Development No.	Old Development No.	Building No.	Date Requested.	Date Completed.	Transition Indicator.	Status.
1	OH004000209	OH004001	0151	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
2	OH004000209	OH004001	0150	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
3	OH004000209	OH004001	0149	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
4	OH004000209	OH004001	0148	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
5	OH004000209	OH004001	0147	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
6	OH004000209	OH004001	0146	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
7	OH004000209	OH004001	0145	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
8	OH004000209	OH004001	0144	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
9	OH004000209	OH004001	0143	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
10	OH004000209	OH004001	0142	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
11	OH004000209	OH004001	0141	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
12	OH004000209	OH004001	0140	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed
13	OH004000209	OH004001	0139	2008-04-13 00:00:00	2008-04-14 03:30:50	Y	Completed

Figure 32: New Development Mapping report

The user can print the report data by clicking the **Print** button, or download the data in the Excel program as a spreadsheet by clicking the **Download in Excel** button.

1.1.8.2 Duplicate Building Report sub Tab

The **Duplicate Building Report** sub tab allows the user to run the Duplicate Building report (see Figure 33). Duplicate buildings are considered actual buildings with the same building number within merging developments that transfer to new development numbers.

Comments		Reports		Forms to New Devs Page	
Mapping Authority	HEID Search	MR Database	Temporary Office	MR History	
Trans to New Development Mns		New Development Mapping Report		Duplicate Building Report	
Select View:		Field Office: <input type="text" value="Public and Indian Housing"/> <input type="button" value="Select"/>			
HQ Office:		Public and Indian Housing			
HQ Division:		PHI Field Operations <input type="button" value="Select"/>			
Hub:		MIWA Miami Hub <input type="button" value="Select"/>			
Field Office:		4DPH MIAMI HIR OFFICE			
Housing Authority:		LEOP PUNTA GORDA <input type="button" value="Select"/>			
		<input type="button" value="Generate Report"/>			

Figure 33: Duplicate Building Report sub tab

For example, a PHA has development A and development B. Both these developments will be transferred to development C. However, development A and development B both have building 1 as part of their inventory. So, during transfer, building 1 from development A remains the same, and the number of building 1 from development B changes to b_1 to avoid duplicate number.




1.0 Housing Inventory


To run the Duplicate Building report, the user must select the desired PHA and click the **Generate Report** button.


The Duplicate Building Mapping report allows the user to see the old building number and the new building number that was assigned to that building (see Figure 34). It also displays the new development number that the building is assigned to.

The user can print the report data by clicking the **Print** button, or download the data in the Excel program as a spreadsheet by clicking the **Download in Excel** button.



Duplicate Building Mapping Report


[Download in Excel](#)


[Print](#)

HQ Office:

Public and Indian Housing

HQ Division:

PO Field Operations

Hub:

2HNYC New York City Hub

Field Office:

2APH NEW YORK CITY HUB OFFICE

Housing Authority:

NY005 New York City HA

#	Development Number.	Old Building Number.	New Building Number.
1	NY005012090	209001	B_0001
2	NY005012090	209001	B_0002
3	NY005012090	209001	B_0003
4	NY005012090	209001	B_0004
5	NY005012090	209001	B_0005
6	NY005012090	209001	B_0006
7	NY005012090	209002	B_0007

Figure 34: Duplicate Building Mapping report